Technical Resources and Assistance

While nongovernmental organizations and their publications often provide useful information, the guidance they offer provides no defense in the case of audit and program review findings. For authoritative guidance on the FSA program requirements, schools should refer first to Department of Education publications, and then to broader U.S. Government publications.

ELECTRONIC ASSISTANCE

FSA Schools Portal

The FSA Schools Portal offers –

The FSA Schools Portal is located at

fsa4schools.ed.gov

♦ links to all FSA Web-enabled systems;

♦ a tool to search across the "links" and/or within IFAP publications;

♦ the opportunity to customize the look of Your Portal Home Page; and

♦ a calendar of FSA deadline dates, training/conferences, events, and NPRM comment due dates.

Information for Financial Aid Professionals

The Information for Financial Aid Professionals (IFAP) Webpage provides a single point through which you can access ED products such as

The IFAP Webpage is located at

ifap.ed.gov

♦ Law and Regulations,

♦ ED Publications (Current and Archived),

♦ Letters and Bulletins,

♦ Tools for Schools,

♦ Online References, and

♦ Policy Guidance.

The FSATech Listserv is located at

**ed.gov/offices/OSFAP/services/
fsatechsubscribe.html**

The Download Center is located at

http://www.fsadownload.ed.gov/

Federal Student Aid Listserv

The Federal Student Aid Listserv (FSATech) is a Listserv where you can ask and get answers to your technical questions about FSA's software or systems. Listserv subscribers will also automatically receive updates about processing and software issues. For more information about FSATech including how to subscribe, visit *Listservs & Mailing Lists* on the FSA Schools Portal.

FSA Download Center for Software and Manuals

The FSA Download Center for Software and Manuals (Download Center) is the place to go to retrieve many of FSA's most helpful publications and products.

Here are some of the materials available through the Download Center that might be useful in the Business Office.

Direct Loan Tools Release 4.0

Direct Loan (DL) Tools for Windows, Release 4.0 is a supplemental Windows based application designed to provide you with help in managing your Direct Loan operations. Direct Loan Tools for Windows can help you –

♦ rebuild your Direct Loan origination and disbursement records in EDExpress using an automated process;

♦ compare the School Account Statement (SAS) report loan/ disbursement data to loans and actual disbursements recorded in EDExpress or an external file, and/or compare the SAS report cash data to the DL Tools Cash database;

♦ print the SAS in a readable format; and

♦ track cash receipts (drawdowns) and Returns of Excess Cash (2002-2003 and 2003-2004) and Refunds of Cash (2004-2005) for Direct Loan.

EDExpress for Windows 2005-2006

The EDExpress software is a 32-bit PC application that processes, packages and manages Title IV student financial aid records. The U.S. Department of Education (ED) provides EDExpress to post-secondary educational institutions that participate in its Electronic Data Exchange (EDE) process. EDExpress for Windows 2005-2006, Release 2.0 is the second software release for the 2005-2006 award cycle and includes Direct Loan and Pell functionality as well as Application Processing, Packaging, and Global functionality (such as Security setup, Document Tracking and User Database).

Federal Perkins DataPrep, Version 3.1

National Student Loan Data System (NSLDS) Federal Perkins DataPrep (Perkins DataPrep), Version 3.1, is software designed to work on Windows 2000 and Windows XP Professional operating systems. It assists schools and third party servicers in reporting Federal Perkins loans to NSLDS. (Schools participating in the Federal Perkins Loan Program are required to report detailed loan information to NSLDS on a monthly basis.)

Perkins DataPrep allows a data provider to:

♦ Validate Extract Files - Perkins DataPrep examines their Database Extract file verifying that its format is acceptable.

♦ Edit Extract Files - Perkins DataPrep checks the Extract file for errors. If the number of errors is within the prescribed limits, Perkins DataPrep creates a new file called the Submittal file.

♦ Create Submittal Files - the Submittal file contains Perkins loans created from the extract file and is transmitted to NSLDS.

♦ Generate Error Reports - Perkins DataPrep analyzes errors received by NSLDS. The two load-processing error reports, *Summary and Detail*, list the errors identified.

EDconnect

EDconnect is a Windows-based software that assists users with sending, receiving, and managing their Federal student aid information electronically. Users collect data on their personal computer (PC) or computer system and transmit the collected data in batches over the Student Aid Internet Gateway (SAIG). The appropriate Title IV Application System receives the data, processes the data, performs any required database cross-referencing, and returns the processed data to the user's SAIG mailbox. The entire processing cycle for routine application data within the SAIG system is typically 72 hours (three working days).

ISIR Analysis Tools for Windows

The ISIR Analysis Tool for Windows, formerly Quality Analysis Tool for Windows, is a stand-alone software application. It focuses on initial and paid on ISIR data. These two transactions are presented side by side for schools to see and to compare the fields that were corrected. Using Estimated Family Contribution (EFC) ranges and increments of change, schools can analyze a specific student population to determine which fields were corrected most often and how those changes affected the students' EFCs. Like the former Quality Analysis Tool for Windows software application, this product allows schools to examine subsets of their sample, which is helpful in analyzing their student population.

Quality Analysis Tool

QA Tool is a new 32-bit program that replaces the Quality Assurance Program for Windows (QAP). QA Tool is significantly different from previous versions of QAP. The most important difference is that QA Tool allows schools to import ISIR data from the 1999-2000 award year to conduct institutional verification research by identifying repeatable patterns occurring in their student population, rather than analyzing awards. As a result, the verification process is improved for QA schools and the financial aid process is easier for students. Using EFC ranges and increments of change, schools can analyze a specific student population to determine which fields were corrected most often and how those changes affected the students' EFCs.

COD Technical Reference 2005-2006

The Common Origination and Disbursement (COD) Technical Reference provides technical specifications and record layouts for transmitting Pell Grant and Direct Loan data to the COD System.

School Electronic Process Guide

The School Electronic Process Guide describes the updates and enhancements to the following products for the 2005-2006 processing cycle:

♦ FAA Access to CPS Online,

♦ Institutional Student Information Record (ISIR) Datamart,

♦ EDExpress for Windows - Global, Application Processing,

♦ Packaging, Pell and Direct Loan,

♦ Direct Loan (DL) Tools, SSCR,

♦ Return of Title IV Funds (R2TIV) on the Web, and

♦ ISIR Analysis Tool.

CENTERS FOR SERVICE

Common Origination and Disbursement (COD) School Relations Center

Hours are 8 a.m. - 8 p.m. (ET), Monday through Friday

Pell Grant Program	800-474-7268
Direct Loan Program	800-848-0978
School Relations Center	800-474-7268
Email	codsupport@acs-inc.com
On the Web	cod.ed.gov
Fax	877-623-5082
TDD/TTY	800-557-7394
COD Technical Reference	ifap.ed.gov/cod/0607 CODTechRef.html

Direct Loan School Support Services (helps with servicing rather than COD issues)

Hours are 8 a.m. – 8:30 p.m. (ET), Monday through Friday

Customer Assistance	888-877-7658
Fax	800-848-0984
TDD/TTY	800-848-0983
On the Web	www.dl.ed.gov/schools

Campus-Based Programs

Hours are 8 a.m. - 8 p.m. (ET), Monday through Friday

Customer Assistance	877-801-7168
Fax	703-761-0220
Email	cbfob@ed.gov
FISAP on the Web	cbfisap.ed.gov
eCampus-Based Program web site	http://cbfisap.ed.gov/ CBSWebApp/welcome.jsp
Campus-Based Program Materials	ww.ifap.ed.gov/ IFAPWebApp/current CBPMaterialsPag.jsp

Training and Conferences

Information and Registration	202-377-3941
Training for Financial Aid Professionals (TFAP) on the Web	ed.gov/offices/OSFAP/ training/index.html
FSA Conferences	http://www.ed.gov/offices/ OSFAP/conferences/ index.html
Video Conferences	http://www.edvideo. walcoff.com/

CPS/SAIG Technical Support

Hours are 8 a.m. - 8 p.m. (ET), Monday through Friday

Customer Assistance	800-330-5947
TDD/TTY	800-511-5806
Email	cpssaig@ed.gov
Fax	319-665-7662
References and Documentation	fsadownload.ed.gov/ docsStudentAidGateway.htm
SAIG Enrollment	fsawebenroll.ed.gov
EDE enrollment/participation	www.FSAwebenroll.ed.gov
FAA Access to CPS Online	http://www.fafsa.ed.gov/ FOTWWebApp/faa/faa.jsp

ED Collections

Hours are 8 a.m. – 10:00 p.m. (ET), Monday through Saturday

Information Center	800-621-3115
TDD/TTY	877-825-9923
Email	dcshelp@pearson.com
Web Site	www.ed.gov/offices/ OSFAP/DCS

FSA Ombudsman (helps resolve student loan concerns when other approaches fail)

Hours are 8:30 a.m. – 8:30 p.m. (ET), Monday through Friday

Customer Assistance	202-377-3800
TDD/TTY	202-377-3800
Email	fsaombudsmanoffice@ed.gov
On the Web	ombudsman.ed.gov

Default Prevention and Management

Calls responded to within 24-48 hours

Phone	202-377-4259
Email	fsa.schools.default. management@ed.gov
Web Site	ifap.ed.gov/ DefaultManagement/ DefaultManagement.html
Fax	202-275-4551

Research and Customer Care Center

Hours are 9 a.m. - 5 p.m. (ET), Monday through Friday

RCCC Customer Assistance	800-433-7327
Email	fsa.customer.support@ed.gov
Fax	202-275-5532

Contact the Research and Customer Care Center (RCCC) for assistance regarding FSA programs and the Information for Financial Aid Professionals (IFAP) web page. The Research and Customer Care Center serves as your advocate within FSA's Application, School Eligibility and Delivery Services. Can't get the assistance you need? Contact RCCC. We'll make sure that your concerns are addressed within FSA. RCCC is made up of U.S. Department of Education, Federal Student Aid employees, located in Washington, DC. RCCC welcomes any inquiry from financial aid professionals relative to the Title IV Federal Financial Aid Programs, and any inquiry pertaining to the IFAP and FSA4Schools (Financial Aid Professionals (FAP) Portal) web sites**.**

Grant Administration and Payment System (GAPS)

Hours are 8 a.m. - 6 p.m. (ET), Monday through Friday

GAPS Hotline	888-336-8930
TDD/TTY	866-697-2696
On the Web	e-grants.ed.gov
Email	edcaps.user@ed.gov

National Student Loan Data System (NSLDS)

Hours are 8 a.m. - 9 p.m. (ET), Monday through Friday

Customer Assistance	800-999-8219
Email	nslds@pearson.com
On the Web	nsldsfap.ed.gov
Reference Materials	http://ifap.ed.gov/ IFAPWebApp/ currentNSLDSPag.jsp

eZ Audit

Hours are 9 a.m. - 5 p.m. (ET), Monday through Friday

Toll Free Phone	1-877-263-0780
Email Address	fsaezaudit@ed.gov
Web Address	ezaudit.ed.gov

PEPS Help Desk

Hours are 7:30 a.m. - 7:00 p.m. (ET), Monday through Friday

Phone   1-877-366-3338

Call the PEPS Help desk for connectivity interruptions or other PEPS application problems.

The FSA Self-Assessments Tool

Web Site   www.ifap.ed.gov/IFAPWebApp/
                                                qualityassurance/
                                                SFAAssessment.jsp

The FSA Self-Assessments Tool (FSA Assessments)is a series of online modules that can help your school examine and improve its program operations. The FSA Assessments can help you –

♦   anticipate and address problems;

♦   spot-check the systems you are using to manage information;

♦   prepare for an audit or program review;

♦   maximize the efficiency of your staff in handling their duties; and

♦   continuously revise your approach to managing the FSA programs as conditions on your campus change.

Each Assessment includes activities to help you test compliance and procedures. The FSA Assessments currently available are –

1.   Student Eligibility,

2.   Awarding Aid,

3.   Satisfactory Academic Progress,

4.   FSA Verification,

5.   Institutional Eligibility,

6.   Default Management,

7.   Consumer Information,

8.   Recertification,

9.   Change In Ownership,

10.   Disbursing Aid,

11.   Reporting and Reconciling,

12. Fiscal Management,

13. Return of FSA Funds,

14. Perkins Due Diligence,

15. Perkins Repayment,

16. Perkins Cancellation,

17. Perkins Awarding and Disbursement,

18. Perkins Forbearance and Deferment,

19. Federal Work-Study,

20. FSEOG,

21. Automation, and

22. Administrative Capabilities.

For a more detailed explanation of how the FSA Assessments can help your school improve its administration of the FSA programs, please see Appendix F.

Training in the basics of FSA Program administration

Annually, the Department provides training for those who administer the FSA programs. You can learn about training offered by the Department at

http://www.ed.gov/offices/OSFAP/training/index.html

In addition, ED offers online training in a program called *FSA Coach* (Coach). Coach offers modules on –

1. an introduction to Federal Student Aid,

2. the FSA ecosystem,

3. student/family responsibilities,

4. a school's communication responsibilities,

5. a school's responsibilities when awarding aid,

6. a school's fiscal and record management responsibilities,

7. determining a student's eligibility for FSA Funds,

8. a school's responsibilities vis-à-vis enrolled and former students, and

9. evaluation of FSA program management.

You can find FSA Coach on the Web at

http://www.ed.gov/offices/OSFAP/fsacoach/index.html

School Participation Teams
School Participation Management
School Eligibility Channel

The School Eligibility Channel (formerly Case management and Oversight) contains three School Participation Management Divisions. These divisions perform similar functions, and each division is responsible for a separate section of the United States. Each division implements the following school participation team functions: audit resolution, program review, financial statement analysis, and recertification. The three divisions are:

- *School Participation Management Division Northeast*
- *School Participation Management Division Southcentral*
- *School Participation Management Division Northwest*

The division functions are performed by teams headed by an Area Case Director and composed of staff from Washington, D.C. and the region. Each division contains two or more of these teams. Listed below are the teams, their telephone numbers, and the states each team is responsible for.

Team	Telephone #	States Covered
School Participation Management Division Northeast		
Boston Team	617-289-0133	Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, and Vermont
New York Team	646-428-3750	New Jersey, New York, Puerto Rico, and Virgin Islands
Philadelphia Team	215-656-6442	Delaware, Maryland, Pennsylvania, Virginia, W. Virginia, and the District of Columbia
School Participation Management Division Southcentral		
Atlanta Team	404-562-6315	Alabama, Florida, Georgia, Mississippi, North Carolina, and South Carolina
Kansas City Team	816-268-0410	Iowa, Kansas, Kentucky, Missouri, Nebraska, and Tennessee
Dallas Team	214-661-9490	Arkansas, Louisiana, New Mexico, Oklahoma, and Texas
School Participation Management Division Northwest		
Chicago Team	312-886-8767	Illinois, Minnesota, Ohio, and Wisconsin
San Francisco Team	415-556-4295	Arizona, California, Hawaii, Nevada, American Samoa, Guam, Republic of Palau, Republic of the Marshall Islands, Northern Marianas, and the Federated States of Micronesia
Denver Team	303-844-3677	Colorado, Michigan, Montana, North Dakota, South Dakota, Utah, and Wyoming
Seattle Team	206-615-2594	Alaska, Idaho, Oregon, Washington, and Indiana

The School Participation Management Division Northeast is also responsible for certification and monitoring of foreign schools. For information on foreign schools you should contact 202-377-3168.